

# Average Financial Advisor Fees 2016-2017<sup>1</sup>

Courtesy of AdvisoryHQ.com

Investment Amounts	Average Fees (%)	Annual Averages <sup>2</sup>
\$ 50,000.00	1.18%	\$ 590.00
\$ 100,000.00	1.12%	\$ 1,120.00
\$ 150,000.00	1.09%	\$ 1,635.00
\$ 250,000.00	1.07%	\$ 2,675.00
\$ 500,000.00	1.05%	\$ 5,250.00
\$ 1,000,000.00	1.02%	\$ 10,200.00
\$ 1,500,000.00	0.94%	\$ 14,100.00
\$ 2,000,000.00	0.91%	\$ 18,200.00
\$ 2,500,000.00	0.88%	\$ 22,000.00
\$ 5,000,000.00	0.84%	\$ 42,000.00
\$ 7,500,000.00	0.77%	\$ 57,750.00
\$ 10,000,000.00	0.69%	\$ 69,000.00
\$ 20,000,000.00	0.65%	\$ 130,000.00
\$ 30,000,000.00	0.59%	\$ 177,000.00

## Entasis Asset Management Fees

Investment Amounts	Average Fees (%)	Annual Averages
\$ 50,000.00	0.80%	\$ 400.00
\$ 100,000.00	0.80%	\$ 800.00
\$ 150,000.00	0.80%	\$ 1,200.00
\$ 250,000.00	0.80%	\$ 2,000.00
\$ 500,000.00	0.80%	\$ 4,000.00
\$ 1,000,000.00	0.65%	\$ 6,500.00
\$ 1,500,000.00	0.65%	\$ 9,750.00
\$ 2,000,000.00	0.65%	\$ 13,000.00
\$ 2,500,000.00	0.65%	\$ 16,250.00
\$ 5,000,000.00	Negotiated	
\$ 7,500,000.00		
\$ 10,000,000.00		
\$ 20,000,000.00		
\$ 30,000,000.00		

<sup>1</sup>In determining the results presented here, AdvisoryHQ used a random sampling approach to review financial advisors' fees across the U.S. Their random sampling approach was based on a fundamental principle called equal probability of selection: when every financial advisor across the U.S. has an equal probability of being selected in a sample, then that sample will be representative of the entire financial advisory population. This is similar to how election polls are conducted today.

<sup>1</sup>The same study showed that average hourly financial planner fees range from \$120-\$300 an hour based on the location of the advisor. Average fixed fees (Annual fees per assets under management) are shown in the table below.

Investment Amounts	Average Fees (Annual)
\$1-\$499,999	\$ 7,500.00
\$500,000-\$999,999	\$ 11,000.00
\$1,000,000-\$1,999,999	\$ 12,500.00
\$2,000,000-\$7,499,999	\$ 37,500.00
Over \$7,500,000	\$ 55,000.00